Taxpayer Access Point Frequently Asked Questions

TAP OVERVIEW

Who can use TAP?

Individuals, businesses and representatives such as accountants, bookkeepers, and payroll professionals can all use TAP to manage their Montana tax accounts.

- <u>Individuals</u> - If you have filed a Montana Individual Income Tax Return within the last 5 years, you can create a login to access your account information in TAP. If you have not filed a Montana Individual Income Tax Return within the last 5 years, you can still use TAP without a login to file your return. TAP is available to non-residents, part year residents, or full year residents. You will not be able to create a login account until you have filed at least one return.
- <u>Businesses</u> - A business that has a Montana Tax Account ID or has already filed a return with the Department of Revenue can sign up for access to their account(s). If you are a new business in Montana with wage withholding, mineral wage withholding, lodging facility tax or rental vehicle tax and need to register your business with the Department of Revenue to file reports, you may complete and file a registration form on TAP by selecting Request Account ID.
- <u>Representatives</u> - Authorized representatives can access and manage tax accounts for their clients.

Benefits of using TAP

- It's Free! – There is no cost to use TAP.
- Convenient – Access TAP where and when you want – 24 hours a day, seven days a week. You won't wait in lines or on the phone.
- Simple – sign up for access the first time you use TAP.
- Secure – TAP protects your tax information and provides you with a secure online experience. The self-created ID and password, as well as an authorization code, verify your identity and allow you to securely do business with the government online.
- Environmentally friendly – you can choose to stop receiving paper returns and vouchers, and manage your taxes online instead.
- Fast – TAP is the fastest way to get your Montana income tax refund. You can also see any payments and changes you make to your account within 24 hours.

Is there a cost to use TAP?

No. Using TAP is a free service of the Montana Department of Revenue.

How is my tax information protected in TAP?

The Montana Department of Revenue has taken several steps to safeguard the integrity of your confidential information. Your browser must support 128-bit encryption to use TAP.
As an added security measure, you will now be required to request and provide a new authorization code each time you log into your TAP account with a public computer. The authorization code will immediately be emailed or a text will be sent to you each time you attempt to access your TAP account from a public or shared computer. If you are using a work or home computer, you can select the "*Trust This Computer*" option, which will eliminate the need to use an authorization code each time you log on. The "*Trust This Computer"* option <u>should not</u> be selected if you are using a public computer, as this could put your confidential information at risk. In addition, you will be required to provide your password after 20

minutes of inactivity and TAP will automatically log you out after 45 minutes of inactivity. Please save your return often so the information entered is not lost.

You can safeguard your tax information when using TAP by:

- Creating a unique password and answer to the secret question
- Keeping your username and password secret
- Logging out of TAP after each session
- Closing your browser after logging out of TAP

MANAGE YOUR TAX ACCOUNT USING TAP FULL SERVICES (LOGIN REQUIRED)

- File or amend certain tax returns or submit license renewals
- Make tax payments (including scheduling payments for future dates)
- View your account history – previously filed returns and previously submitted payments
- Update account information such as an address or name change
- Grant your account representative (accountant, bookkeeper, or other professional) third party access to use TAP on your behalf
- Access all your tax accounts under a single login

Which taxes, fees, and licenses can I access online using TAP?

Agency Liquor Store (LIQ)	Excise and License Tax (ELT	Oil and Gas Production Tax (COG)
Bad Debts (BDT)	Fiduciary-Estates and Trusts (FID)	On-Premises License (ONP)
Beer Connoisseur Tax (BCT)	Foreign Brewery Import License (FBI)	Other Tobacco Products (OTP)
Beer Tax (BET)	Foreign Winery Import License (FWI)	Partnership (PTR)
Bentonite (BEN)	Gambling Operator (GOA)	Personal Property Reporting (PPR)
Brewery Storage Depot (BSD)	Hard Cider (HCT)	Public Service Regulation Fee (PSR)
Cement and Gypsum (CGT)	Hospital Facility Utilization Fee (HUF)	Rental Vehicle Tax (RVT)
Cigarette Tax (CIG)	Individual Income Tax (IIT)	Resource Indemnity Tax (RIT)
Coal Gross Proceeds (CGP)	Industrial Property Reporting (IPR)	Retail Telecommunications Excise Tax (RTE)
Coal Severance Tax (CST)	Liquor Shipper (TRK)	Small Business Corp (SBC)
Common Carrier Tax (LCT)	Liquor Vendor Acct (LVA)	Telephone Device for the Deaf (TDD)
Connoisseur License (CON)	Lodging Facility Sales & Use (LFT, LST)	Vendor Representative License (VRL)
Consumer Counsel Fee (CCT)	Metal Mines Gross Proceeds (MMG))	Wholesale Energy Trans Tax (WET)
Corporate License Tax (CLT)	Metalliferous Mines License Tax (MML)	Wholesale License (WSL)
Distilled Spirits Mfr License (DSM)	Mineral Royalty (MRW)	Wine Connoisseur Tax (WCT)
Domestic Brewery License (DBR)	Misc Mines Net Proceeds (MMN)	Wine Tax (WIT)
Domestic Winery License (DWR)	Nursing Facility Utilization Fee (NFB)	Withholding Tax (WTH)
Electrical Energy Tax (EEL)	Off-Premises License (OFF)	911 Emergency Telephone Fee (911)

Can I access multiple tax accounts through my TAP account?

Yes. Once you have signed up for TAP, you can add access to any tax account that is part of the TAP system by following these steps:

1. Select Add Access to Another Account located on the left side of the screen
2. Enter verification information for each account:
    - Individual Income Tax – Your social security number and Federal Adjusted Gross Income (Fed AGI) from your last filed return in Montana. If you only filed a 2EC last year, you may use the total gross household income from Form 2EC line 1. You must have filed a return within the last 5 years to gain access to your Montana TAP account.
    - Business Income Tax, Miscellaneous or Liquor accounts – the 13 digit alphanumeric Montana Tax Account ID, formatted as this example: 1234567-890-XXX.
    - Wage Withholding – the 13 digit alphanumeric Montana Tax Account ID formatted as this example: 1234567-890-WTH, zip code, and last payment amount or total wages paid subject to withholding from your most recent form MW-3 or your FEIN.
3. Select Submit
4. Select My Accounts under Navigation on the left hand side of screen. The new account will appear in your Account list.

What information do I need to sign up for account access in TAP?

You must be a customer in our tax system (have a Montana Tax Account ID or have filed a previous return) and have a valid email address to sign up for TAP access. You will also need the following information:

- Individual Income Tax
    - Social Security Number
    - Federal Adjusted Gross Income (Fed AGI) from your last return filed in Montana. If you only filed a Form 2EC last year, you may use the total gross household income from Form 2EC Line 1. You must have filed a return within the last 5 years to gain access to login to your Montana TAP account. If you do not know your Federal Adjusted Gross Income (Fed AGI) from your last return filed in Montana, please contact us.
- Business Income Tax, Miscellaneous Taxes or Liquor Accounts
    - Montana Tax Account ID assigned by the Department of Revenue when an account is created. This 13-digit alphanumeric ID is formatted as this example: 1234567-890-XXX. If you do not know your Montana Tax Account ID, please contact us.
- Wage Withholding
    - The 13 digit alphanumeric Montana Tax Account ID formatted as this example: 1234567-890-WTH.
    - Zip code
    - Federal Identification Number (FEIN). Instead of your FEIN, you may use the last payment amount, or total wages paid subject to withholding from your most recent Form MW-3.

LOGINS AND PASSWORDS

How do I sign up for account access?

1. Go to TAP
2. Select the Sign up Now! Button, in the lower right corner of the screen under 'Sign up for Account Access'
3. Enter the required information and select Submit.

Within 5-10 minutes you will receive an authorization code and you may log in to your account.

I signed up for TAP access but have not received an authorization code yet. Where is it?

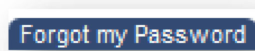
The authorization code will come from DoNotReply.TAP@mt.gov. Some internet providers and spam filters may stop certain emails. Ensure you set these filters to allow an email from DoNotReply.TAP@mt.gov. If you are unable to locate the email, please contact us for further assistance.

Do I need to enter my authorization code each time I log in to TAP?

Yes, you will be required to request and provide a new authorization code each time you log into your TAP account unless you choose the *"Trust This Computer"* option ***(see page 4 "How Is My Tax Information Protected in TAP").*** Do not choose this option if you are using a public computer. You can receive the authorization code through email or text message.

I forgot my password. How do I access my account?

If you have forgotten your password, please use the Forgot My Password feature, located in the top right hand corner of the login screen. You will need your username and answer to your secret question. A new authorization code will be emailed to you to use at login.



I forgot my password and followed the steps but have not received an authorization code yet. Where is it?

The authorization code will come from DoNotReply.TAP@mt.gov. Some internet providers and spam filters may stop certain emails. Ensure you set these filters to allow an email from DoNotReply.TAP@mt.gov. If you are unable to locate the email, please contact us for further assistance.

I'm worried that my password has been compromised. What should I do?

You can change your password at any time by following these steps:

1. Log in to TAP
2. Select View My Profile
3. Select Change Password
4. Follow instructions to set a new password

I no longer want access to my accounts in TAP. How do I cancel my access?

1. Log in to TAP
2. Select View My Profile
3. Select Cancel My Online Access

4. Enter your password
5. Select OK

If you decide later that you want to access your accounts in TAP, you must sign up for TAP access again with a new Login ID. Login IDs cannot be re-used.

FILING AND VIEWING RETURNS

How do I file a return?

1. Log in to TAP
2. Select Account ID from your Home Page
3. Under the Periods tab, ensure that the All Periods tab is selected
4. Select File Now (or Returns to File or View) next to the period you wish to file

I've completed all my information on the return. A step still shows "Needs Correction. " How do I find my errors?

Errors are indicated in red, which signifies there is incorrect information in a field, and must be corrected before submitting a return. Fields with a yellow triangle in the upper left corner are required.

Where do I find a previously filed return?

1. Log in to TAP
2. Select Account ID from your Home Page
3. Under the Periods tab, assure that the All Periods tab is selected. If you do not see previously filed returns, select Change Date and enter an earlier date
4. Select View Returns (or Returns to File or View) next to the period you wish to see

What if the year I need to file is not listed?

If the year you wish to file is not listed in the All Periods tab, you can file online with tax software or a paper return can be filed. A list of the latest approved software is on our website at http://revenue.mt.gov/home/online_services. Paper forms can be found in our downloadable forms.

Can I save my return and finish it later?

1. Select the Save and Finish Later button
2. Enter your password and Select OK. A Confirmation screen will appear.

When you return to TAP, follow these steps to finish your return:

1. Log in to TAP
2. In the My Accounts tab, click on the blue Account Id link
3. Under the Periods tab, ensure that the All Periods tab is selected
4. In the All Periods tab, click on Returns to File or View associated with the tax year you want to change
5. Select View Request
6. Select Change to edit and finish your return
7. Select Submit to file your final return

How do I change my saved return?

1. Log in to TAP
2. In the My Accounts tab, click on the blue Account Id link
3. Under the Periods tab, ensure that the All Periods tab is selected
4. In the All Periods tab, click on Returns to File or View for the period you want to change
5. Click on View Request
6. Click on Change to edit and finish your return
7. Select Submit to file your final return

What does the 'Withdraw' button in TAP do?

If you wish to remove your TAP return and begin a new one, you can select Withdraw, which will remove your return from an active status. You will still have the opportunity to view this return, but you will not be able to change, save or submit it.

Why can't I make changes or enter information after saving my return?

If you have saved your return, you will need to select Change before you will be able to enter any information or make any changes to your return.

I have submitted a return in TAP. How can I tell if it has been processed or find its status?

Go to your TAP account and select the Requests tab. From the Request screen select the Search tab. If the status says:

- Stored – you have not submitted the return to be processed. Select the title link, and then select Change on the left side of your screen. From here, you can complete your return and select Submit to file your return with MT Department of Revenue.
- Pending – The return is waiting to be loaded to our main tax system. The upload occurs at 5pm each day. A return can be withdrawn or changed if the status is Pending.
- Complete – The return has been loaded to our main tax system. If changes need to be made, an amended return is required.

How do I amend a previously filed return?

Individual Income Tax Returns cannot be amended through TAP. Amended tax returns can be filed online with tax software (even if the software was not used to submit the original return) or a paper return can be filed. A list of the latest approved software is on our website at http://revenue.mt.gov/home/online_services. Paper forms can be found in our downloadable forms.

The following returns can be amended through TAP.

- 911 Emergency Telephone Fee (911)
- Beer Tax (BET)
- Bentonite Production Tax (BEN)
- Consumer Counsel Fee (CCT)
- Cement and Gypsum Producers License Tax (CGT)
- Coal Gross Proceeds Tax (CGP)

- Coal Severance Tax (CST)
- Electrical Energy Producers License Tax (EEL)
- Hospital Facility Utilization Fee (HUF)
- Lodging Facility Sales and Use (LFT)
- Metalliferous Mines License Tax (MML)
- Metal Mines Gross Proceeds Tax (MMG)
- Miscellaneous Mines Net Proceeds Tax (MMN)
- Oil and Natural Gas Production Tax (COG)
- Public Service Regulation Fee (PSR)
- Rental Vehicle Tax (RVT)
- Resource Indemnity Trust Tax (RIT)
- Retail Telecommunications Excise Tax (RTE)
- Telephone Device for the Deaf (TDD)
- Wholesale Energy Trans Tax (WET)
- Wine Tax (WIT)

I submitted my return, but realized I made a mistake. Can I correct it?

Submitted returns can be changed until 5pm on the day of submission. To make changes to a submitted return within the time limit, follow these steps:

1. Log in to TAP
2. Select Account ID from your Home Page
3. Select View Request for the return you need to update
4. Select Change

If you were unable to make your change prior to 5pm, an amended return is required and can be filed online with tax software (even if the software was not used to submit the original return), or a paper return can be filed. A list of the latest approved software is on our website at http://revenue.mt.gov/home/online_services. Paper forms can be found in our downloadable forms.

I have entered my W-2 and 1099 information and the information did not total and go to the correct lines on the form. Why?

TAP will not carry W-2 or 1099 information over to the income tax form. Often a taxpayer will have income that was not reported to them on a Form W-2 or 1099. An error will occur if the income value entered is less than the total W-2s or 1099s entered, or if the withholding value of the W-2s or 1099s entered is more than the total entered on the income tax form.

Why do I need to fill out all of my W-2 and 1099 information when these forms aren't required with paper filings?

This information is not required to file in TAP. However; it is recommended that you maintain a copy of the Forms W-2 and 1099 in your personal files as they may be requested at a later date if your return is selected for review.

PAYMENTS IN LOGIN ACCOUNT

How do I make extension and estimated tax payments using TAP?

1. Log in to TAP
2. Select Account ID from your Home Page
3. On the left side of the screen select Make a Payment
4. Select the Period for which you are making a payment
5. Select the Payment Type that you are making

How do I pay the outstanding balance on my account?

1. Log in to TAP
2. Select Account ID from your Home Page
3. On the left side of the screen select Pay Account Balance
4. Select the option you would like to pay with and follow the prompts

Can I make an e-Check or ACH Debit payment?

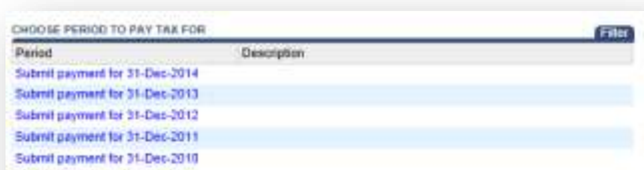
Yes. Enter your bank routing and account number after selecting the e-check option for a payment. (No fee)

Can I make a payment by debit or credit card?

Yes. We accept Visa or Master Card. Debit and Credit Cards are subject to a fee charged by the processor service.

I can't find the period end date that I need to pay for. What do I need to do?

Use Make a Payment on the left side of the screen. It will display prior and future period end dates. If you are still unable to locate the period end date you want to pay for, contact us for further assistance.



I have tax due on my return but cannot pay it in full by the due date. Can I make a payment arrangement?

Payment arrangements can be requested by submitting Form ARC-1 (Request for a Payment Plan) by mail.

I made an error entering my payment information. How do I fix it?

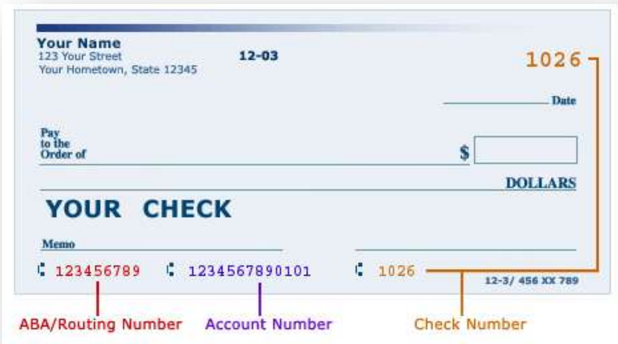
If you made an e-check or ACH debit payment you have until 5 pm on the payment date to correct it. You must cancel the e-payment and re-enter a correct payment. To cancel a payment:

1. Log in to TAP
2. Go to the Requests tab

3. Select the payment you wish to change
4. Select Withdraw on the left side of the screen
5. Select Confirm to complete the withdrawal
6. To enter a correct payment, go back to the Period tab & select Make a Payment or Pay

If you made a Debit or Credit Card payment, it cannot be canceled. The transaction is sent immediately to the banking institution. You may contact your banking institution for assistance.

How do I find my bank routing and account number?



What information will my bank need to process debit payment requests?

Some banks may need our payment authorization code: 3810302402

Can I save my bank information for future use?

1. Log in to TAP
2. Select View My Profile from your Home Page
3. Under My Accounts tab, select the Advanced Payment Options tab
4. Select Add New
5. Enter banking information
6. Multiple bank accounts may be saved. Be sure to be update any changes and remove unused accounts

Can I change or delete bank information I have saved?

1. Log in to TAP
2. Select View My Profile from your Home Page
3. Under My Accounts tab, select Advanced Payment Options tab
4. Select Bank Name
5. Select Delete on left side of screen
6. Select Confirm on left side of screen

Can I submit a payment to process on a future date?

Yes, ACH Debits and e-checks can be scheduled for a future date if you are logged in to TAP. When submitting an ACH Debit or e-check, select a payment date in the future up to 365 days.

Will I get a confirmation number if I make a payment in TAP?

Yes. After you enter your password to submit a payment, you will be provided with a confirmation number.

How long will it take for my payment to process?

Payments will usually post to your bank account within 3 to 5 business days.

Why do you ask about accounts outside the U.S.?

We are unable to accept payments from an account outside the U.S. at this time.

I have submitted a payment in TAP. How can I tell if it has been processed or find its status?

Go into the account and select the Requests tab. From the Request screen, select the Search tab. If the status says:

- Pending – The payment is waiting to be processed to our main tax system. The upload occurs at 5pm each day. A payment can be withdrawn or changed if the status is Pending
- Complete – The payment has been processed

How do I view my payment history?

After logging into TAP, select Account ID and choose the Activity tab. This will display your returns and payments.

OTHER FORMS REQUIRED FOR FILING YOUR RETURN

Montana Tax Credits - I am completing my Montana Tax Credits schedule and am also required to complete a credit form. When I click on the credit form link, TAP opens the document in a different tab. Are these forms submitted with my return through TAP?

No. When you click on the credit form link, the document will be opened in a separate tab for you to complete; however, these are not submitted through TAP, as they are for your use in calculating the credit. You will need to save this form to your computer as a separate file or print it out for your records. Please keep these files handy in the event an auditor requests that information at a later time.

Federal Tax Forms - I am completing my Montana Tax Return and the return states that I must include certain Federal Forms. Can I attach and send these forms through TAP?

No. We recommend that you simply maintain a copy of these Federal Income Tax Forms for your records and be able to provide them to the Montana Department of Revenue in the event that your return is selected for review.

WHERE'S MY REFUND?

I have submitted my return, how do I check my refund?

1. Go to TAP
2. Under Individual, select "Where's My Refund"
3. Enter your Social Security Number (SSN), the amount you are expecting as a refund, and check the "I declare under penalty…" checkbox

TAP will provide you with one of the following messages regarding the status of your return and refund. The status of your refund depends on where your return is in the process.

1. Your return is not on our system at this time. You may have submitted your return, but our tax system has not accepted it yet. Your return goes through a verification process for errors and fraud detection before it loads to your account. Once verification is complete, your return will load to our system and be added to your tax account. If you filed electronically, it can take five business days for your return to appear in our system. If you filed by paper, it can tax up to eight weeks from the date our mailroom receives the return to appear in our system.
2. Your return for the year _______ was received on _____________. Once your return has passed verification, it is applied to your tax account and marked as received. Our system conducts an additional error review and notifies a staff member of necessary corrections. We may contact you for clarification.
3. Your return for the year _______ was processed on ___________. At this point, we have reviewed your return for errors and fraud, and approved the refund. If you requested a direct deposit, it may take up to five to seven business days to receive your refund. If there are errors in your routing or account numbers for direct deposit, it will be canceled and a paper check will be issued. If you requested a paper check, it may take seven to ten business days to receive your refund.

Possible reasons for refund delay:

1. You filed your return during peak processing times. The earlier you file and request a refund before the deadline, the more likely you are to avoid peak processing times. Processing in February is much faster than March and April.
2. Your return did not pass the verification process and we must research the cause. For example, if your social security number was mistyped, your return will not connect with your tax account. In this case, we will need to find the appropriate account manually.
3. If you e-filed your return, the IRS must first accept your return and then forward it to us. If their e-file system is disrupted, it could delay our receipt of your return.
4. Your return has line item or calculation errors that we will need to correct manually.
5. Your refund may have been offset to pay a creditor you owe. This may include the Internal Revenue Service or any Montana state agency.

FILE AN INDIVIDUAL TAX RETURN (NO LOGIN REQUIRED)

I saved my return to finish later. How do I get back to it?

1. Go to TAP
2. Under Individual, select Retrieve a Saved Return
3. Enter your email address and the 6 digit alphanumeric retrieval code emailed to you at the time you saved your return
4. Select Search

If your return is incomplete (has not been submitted), remember to select Change to continue.

I have saved or submitted my return, but forgot to write down my retrieval code. Can I still access my return?

Check your inbox for an email from DoNotReply@mt.gov which contains your retrieval code. You may need to check your spam or junk folder. If you need further assistance contact us.

I'm unable to change information on my return, what do I do?

If you have not submitted the return, select Change to update it. If you have submitted your return and need to make changes, an amended return can be filed online with tax software (even if the software was not used to submit the original return) or a paper return can be filed. A list of the latest approved software is on our website at http://revenue.mt.gov/home/online_services. Paper forms can be found in our [downloadable forms](#).

Can I print a draft copy of my return prior to submitting?

Yes.

1. Select Save and enter your email address to save the return.
2. Select the View and Print button

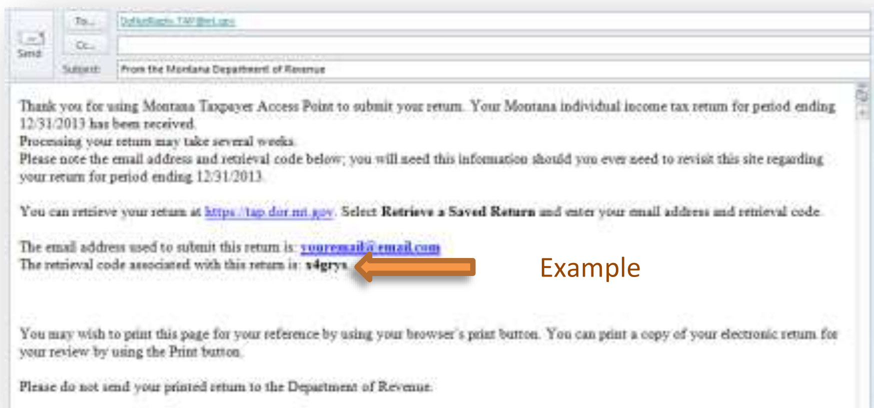
After submitting my return, can I go back and print it?

Yes.

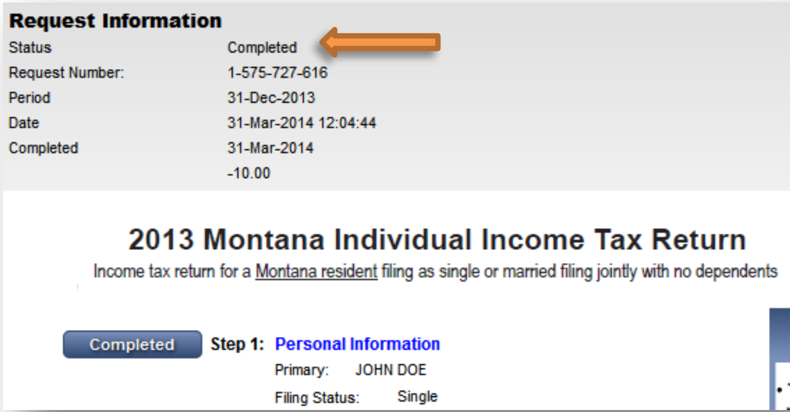
1. Go to TAP
2. Under Individual, select Retrieve a Saved Return
3. Enter your email address and the 6 digit alphanumeric retrieval code
4. Select Search
5. Select the View and Print button

I've submitted an individual income tax return, how can I tell if it has processed or what the status is?

1. Go to TAP
2. Under Individual, select Retrieve a Saved Return
3. Enter your email address and the 6 digit alphanumeric retrieval code emailed to you at the time you saved your return



4. Select Search
5. When your return is retrieved you will see the status of the return in the upper portion of the screen
   - Stored – indicates that you have saved the return to complete later. To continue your return, select Change on the left side of the screen.
   - Pending - indicates that you have submitted the return and it has not loaded to our main tax system. Changes can be made until 5 pm on the day that you submitted the return.
   - Complete – The return has been loaded to our main tax system. If changes need to be made, an amended return is required.



I have submitted my return, but realized I made an error. How can I fix it?

If the status of your return is pending, you may select Change, or Withdraw if you prefer to start your return again.

If you have submitted the return and the status is Complete, an amended return is required and can be filed online with tax software (even if the software was not used to submit the original return), or a paper return can be filed. A list of the latest approved software is on our website at http://revenue.mt.gov/home/online_services. Paper forms can be found in our downloadable forms.

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2. Your return for the year _______ was received on _____________. Once your return has passed verification, it is applied to your tax account and marked as received. Our system conducts an additional error review and notifies a staff member of necessary corrections. We may contact you for clarification.
3. Your return for the year _______ was processed on ___________. At this point, we have reviewed your return for errors and fraud, and approved the refund. If you requested a direct deposit, it may take up to five to seven business days to receive your refund. If there are errors in your routing or

account numbers for direct deposit, it will be canceled and a paper check will be issued. If you requested a paper check, it may take seven to ten business days to receive your refund.

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1. You filed your return during peak processing times. The earlier you file and request a refund before the deadline, the more likely you are to avoid peak processing times. Processing in February is much faster than March and April.
2. Your return did not pass the verification process and we must research the cause. For example, if your social security number was mistyped, your return will not connect with your tax account. In this case, we will need to find the appropriate account manually.
3. If you e-filed your return, the IRS must first accept your return and then forward it to us. If their e-file system is disrupted, it could delay our receipt of your return.
4. Your return has line item or calculation errors that we will need to correct manually.
5. Your refund may have been offset to pay a creditor you owe. This may include the Internal Revenue Service or any Montana state agency.

PAYMENTS WITHOUT A LOGIN ACCOUNT

How do I make current year, extension and estimated tax payments using TAP?

Payments are not made directly within TAP, but you will be directed to the 'Income Tax Express' payment portal to process your payment.

Follow these steps to make an extension or estimated tax payment:

1. Go to TAP
2. Select the Make a Payment link which will direct you to Income Tax Express
3. Enter the personal information
4. Enter the payment information (amount and year)
5. Enter credit card or e-check information

Can I make an e-Check or ACH Debit payment?

Yes. Payments are not made directly within TAP, but you will be directed to the 'Income Tax Express' payment portal to process your payment. There is no fee associated with e-check or ACH debit payments. Follow these steps to make an e-Check or ACH Debit payment:

1. Go to TAP
2. Select the Make a Payment link which will direct you to Income Tax Express
3. Enter the personal information
4. Enter the payment information (amount and year)
5. Enter e-check information

Can I make a payment by credit card?

Yes. Payments are not made directly within TAP, but you will be directed to the 'Income Tax Express' payment portal to process your payment. There is a fee associated with credit card payments.

Follow these steps to make a credit card payment:

1. Go to TAP
2. Select the Make a Payment link which will direct you to Income Tax Express
3. Enter the personal information
4. Enter the payment Information (amount and year)
5. Enter your credit card information

I have tax due on my return but cannot pay it in full by the due date. Can I make a payment arrangement?

Payment arrangements can be requested by submitting Form ARC-1 (Request for a Payment Plan) by mail.

How do I find my bank routing and account number?

What information will my bank need to process debit payment requests?

Some banks may need our payment authorization code: 3810302402

Can I submit a payment to process on a future date?

Yes, but only if you are logged into your TAP account. If you are not logged into TAP, you will be directed to the 'Income Tax Express' payment portal to process your payment. ACH Debits and e-checks cannot be scheduled for a future date within Income Tax Express.

How long will it take for my payment to process?

Payments will usually post to your bank account within 3 to 5 business days.

Why do you ask about accounts outside the U.S.?

We are unable to accept payments from an account outside the U.S. at this time.

THIRD PARTY ACCESS

What is third party access?

Third party access can be granted to an accountant, bookkeeper, tax preparer, or other professional that is conducting business on behalf of their client (tax account holder.) The tax account holder can grant different levels of access to their account. This access remains until the tax account holder removes or changes permission.

Third party access options available in TAP

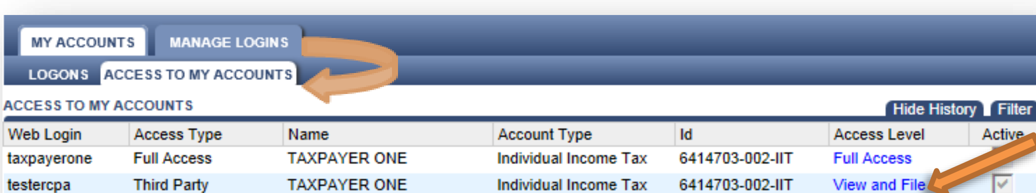
There are three levels of third party access a tax account holder can grant:

- Full access – edit name, address, file returns, submit payments and view previously filed returns and payments
- View– view previously filed returns and payment history
- View and File – view previously filed returns, view payment history, file returns, and submit payments

How do I permit third party access?

If someone is requesting access to your account, such as an accountant, you will receive an email stating who requested access. If you choose not to grant access, no action is required. If you choose to grant access, follow the steps below.

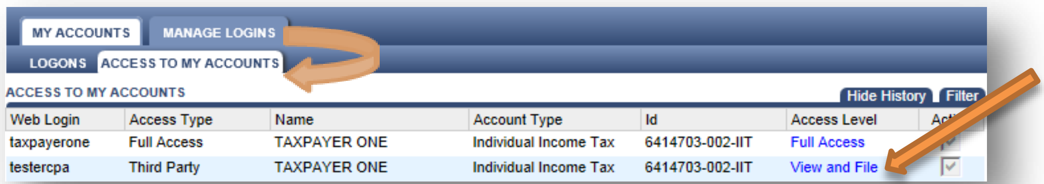
1. Log in to TAP
2. Select View My Profile
3. Select Manage Logins tab
4. Select Access to My Accounts tab
5. Select the blue link under the Access Level that pertains to the person who is requesting access
6. Select the Access Level from the drop down box
   - Full access – edit name, address, file returns, submit payments and view previously filed returns and payments
   - View– view previously filed returns and payment history
   - View and File – view previously filed returns, view payment history, file returns, and submit payments
7. Check the Active box
8. Select Save

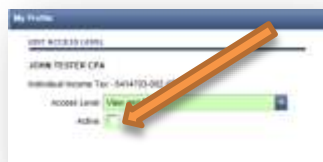


How do I cancel third party access?

From the home page of your TAP Account, you can remove or change third party access levels as follows:

1. Select View My Profile
2. Select Manage Logins tab
3. Select Access to My Accounts tab
4. Select the blue link under the Access Level that pertains to the person who is requesting access.
5. Uncheck the Active box
6. Select Save





I'm a Tax Preparer representing clients. How do I sign up for TAP?

1. Go to TAP
2. Select the Sign up Now! Button, in the lower right corner of the screen under 'Sign up for Account Access'.
3. Enter the required information and select Submit
   a. Reminder for Step 1, do not select an Account Type. Select "yes" for the *Are you a Professional Tax Preparer* and then enter your SSN or FEIN as requested

Within 5-10 minutes you will receive an authorization code by email and you may login to your account.

1. Log in to TAP with your username, password and authorization code
2. Select Add Access to Another Account. Follow the steps provided to add client accounts

I'm a Tax Preparer. How do I access my client's account?

Your client must have a TAP account before you can request access to it.

1. Log in to TAP
2. Select Add Access To Another Account
3. Select the Account Type from the drop down box you wish to access in Step 1
4. Select Profile Information in Step 2
   - Individual Income Tax – Enter your client's Social Security Number and Federal Adjusted Gross Income (Fed AGI) from their last return filed in Montana. If he/she only filed a 2EC last year, use the total gross household income from their Form 2EC line 1. Your client must have filed a return within the last 5 years to gain access to their tax account in TAP.

- Business Income Tax, Miscellaneous Taxes, or Liquor Accounts – Enter your client's 13 digit alphanumeric Montana Tax Account ID, formatted as 1234567-890-XXX.
- Wage Withholding – Enter your client's 13 digit alphanumeric Montana Tax Account ID formatted as 1234567-890-WTH, zip code, and either their FEIN, last payment amount or their total wages paid subject to withholding from their most recent Form MW-3.

5. Select OK
6. Select Submit

An email will be sent to your client notifying them of your request to access their account(s). They must grant you access before you are able to view their account(s).

PRINTING AND OTHER TAP ISSUES

TAP doesn't seem to be working right. What should I do?

Previous visits to the TAP website will occasionally affect the way TAP functions in future visits. If you are sure that your computer follows the required settings and you are still having problems with TAP, we recommend that you clear your 'cookies'. Select the link for the browser that you are using to learn how to remove 'cookies' that might be causing TAP issues:

Internet Explorer
Firefox
Google Chrome

My browser signaled a pop-up blocker and I am not able to file. What should I do?

To use TAP, pop-ups must be allowed in your web browser. To disable pop-up blockers, select the link below for assistance with your web browser and pop-ups.

Internet Explorer
Firefox
Google Chrome
For Other internet browsers – use the browser's help option.

I am trying to view/print a letter or return, but the document is not displaying. What should I do?

There are a few things you will need to check:

1. You will need the current version of Adobe Reader to view and print your copy. If you do not already have the current version of Adobe Reader installed on your computer, you may download the software for free at http://enable-javascript.com/
2. Your letter or return may open in a new window. Check to see if there is another open window containing your document.
3. You may also need to check your pop-up blockers. If you are not allowing pop ups from the TAP website, the document cannot be seen. (***See pop-up blocker information above***)

OPERATING SYSTEM AND BROWSER REQUIREMENTS

What are the operating system and browser requirements to use TAP?

Operating system: There are no requirements. All systems should work as long as they can run a browser.
Browser requirements:

Internet Explorer 7+
Firefox 3+
Opera 10+ (and possibly lower versions)
Safari 5+ (and possibly lower versions)
Chrome IOS 3+
Android 2.1+

What are my browser's required settings to use TAP?

128-bit encryption – this is standard on most web browsers.

JavaScript enabled – if you are unsure if JavaScript is enabled on your browser, select the following link for help: http://enable-javascript.com/

Cookies enabled - if you are unsure if Cookies are enabled on your browser, select the following link for help: http://www.whatarecookies.com/

Pop-ups enabled - click the following link for your browser to find out if pop-ups are enabled and how to enable them if they are not:

Internet Explorer
Firefox
Google Chrome

For Other internet browsers – use the browser's help option.

What is required to view and print my return through TAP?

Adobe Reader – if you do not have Adobe Reader, it can be downloaded free by clicking on the following link: http://www.adobe.com/products/reader.html

CONTACT THE DEPARTMENT OF REVENUE FOR ASSISTANCE

Call our **Citizen Services Call Center** for assistance with your individual, nonresident, or business tax questions. Our hours of service are Monday through Friday, 8 a.m. to 5 p.m. (Mountain Time)

In Helena	406-444-6900
Outside of Helena	1-866-859-2254
Telephone Device for the Deaf-TDD	406-444-2830
After hours/weekends:	Citizen Services Email